

Instruction Guide

RESIDENTIAL

EEPM 2.0



ENERGY EFFICIENCY PROGRAM



TABLE OF CONTENTS

About EEPM 2.0	4
Program Participation	5
Service Provider Dashboard	6
Program Option Activity	6
Eligible Programs	6
Program Applications	7
Creating a Customer Site List	11
Add Site Information.....	12
Add site documents.....	14
Add Measures.....	17
Edit Site & Measure	18
Site & Measure Information in Customer Site List Screen	19
Starting a New Residential Project	20
My Projects	21
Start a New Project.....	22
Close Customers	22
Customers & Measures.....	23
Upload Documents	24
Review and Submit.....	25
Editing a Project	27
Recently Viewed Projects	28
My Projects	28
Request for Duplicate Approval	29



A dedicated and secure online portal, EEPM 2.0 makes it easier for service providers to participate in Oncor's Energy Efficiency programs.

With enhanced functionalities and an enriched user interface, the portal allows service providers to create and submit projects, and apply for incentives with minimal effort. Portal designed to be responsive for mobile and tablet devices, which enables service providers to enter customer site and measure data directly into EEPM from the customer's premises. The introduction of online e-sign templates for the host customer agreement and income eligibility certificate enables service providers to get documents signed directly from mobile devices - eliminating excessive paperwork.

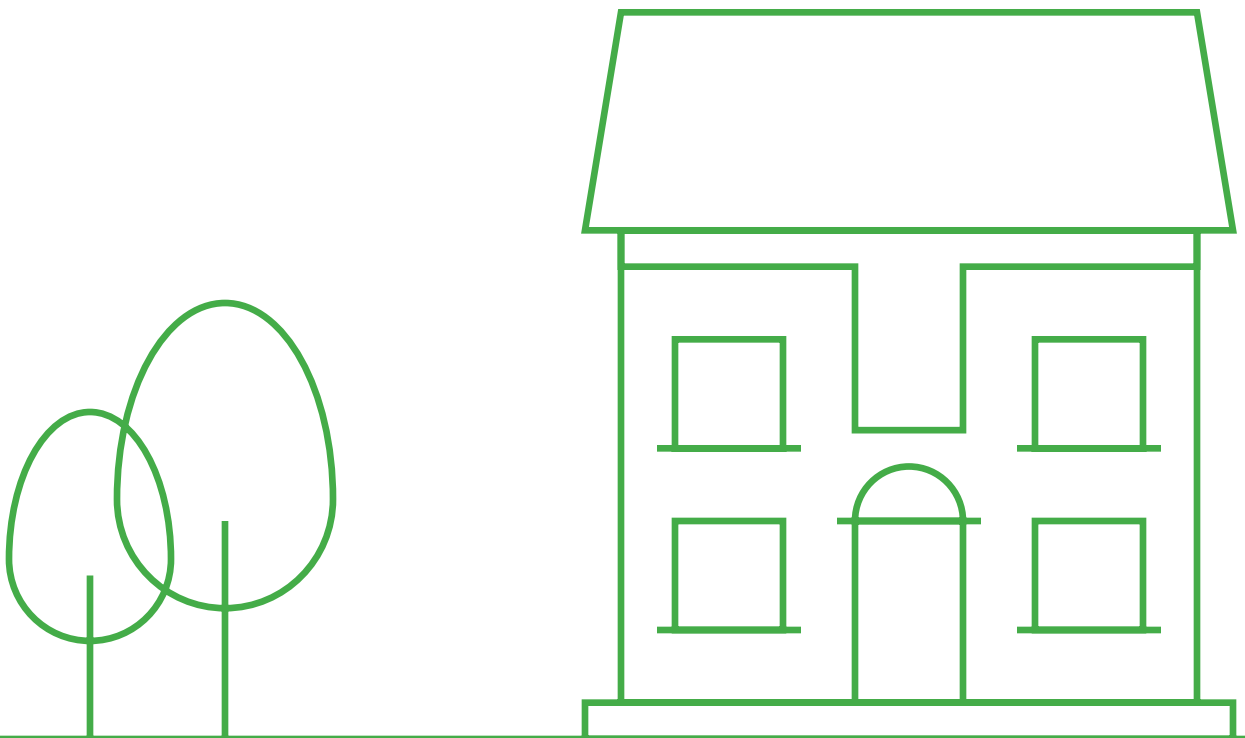
The new and improved process will reduce the time it takes to create and submit projects, and eliminate data entry errors in savings calculations.

Whether you're starting a new project or editing an existing one, this guide covers everything you need to know when you log in to EEPM 2.0.



Program Participation

RESIDENTIAL



SERVICE PROVIDER DASHBOARD

EEPM 2.0 features a new dashboard that offers quick and easy access to the information you need most often, including:

- Program options in various stages
 - Active Programs
 - Program Applications
 - Eligible Programs
- Recent project data based on specific categories
 - Action Required
 - Recently Viewed Projects
 - Projects Nearing Completion Date
 - Recently Viewed Sites
- Insurance expiration highlights
- ESI ID validation
- Incentive calculator
- Training guide link
- Residential forms

The screenshot displays the Energy Efficiency Contractor Portal interface. At the top, there's a header with the ONCOR logo and 'Energy Efficiency Contractor Portal'. Navigation tabs include HOME, MY APPLICATIONS, OPEN CUSTOMERS, MY PROJECTS, MY ACCOUNT, REQUEST DUPLICATE APPROVAL, and ONLINE HELP. A user profile for Justin Lantern (Admin) is visible in the top right.

The main content area is divided into three summary cards:

- ACTIVE PROGRAMS (2):** Shows a table for '2017 H.E.E. Multi Family Program...' with columns for Program Budget (Total: \$1,000,000.00, Remaining: \$282.09) and My Budget (Total: \$300,000.00, Incentive Paid: \$0.00, Reserved/Blocked: \$0.00, Remaining: \$300,000.00).
- PROGRAM APPLICATIONS (1):** Shows a table for '2017 H.E.E. Reserve Program Optio...' with columns for Program Budget (Total: \$1,784,110.00, Allocated: \$1,784,100.00, Remaining: \$10.00) and My Budget (Total: \$100,000.00, Incentive Paid: \$0.00, Reserved/Blocked: \$6,881.38, Remaining: \$93,118.62).
- ELIGIBLE PROGRAMS (1):** (Empty card)

Below these is a 'RECENTLY VIEWED PROJECTS' table:

Projec...	Projec...	Status	Incentive Amount	Sites	Estimated Completion D...
2018 Test Solar Project	188PVRES - 2017 - 59911	IA Open	\$0.00	1	10-17-2017
DeveloperT...	18BCSOP - 2017 - 59997	IA Awaiting eSignature	\$0.00	1	10-31-2017
TestTrans...	18CCOIP - 2017 - 58903	FA Pre-Inspection Completed	\$3,409.53	1	10-19-2017

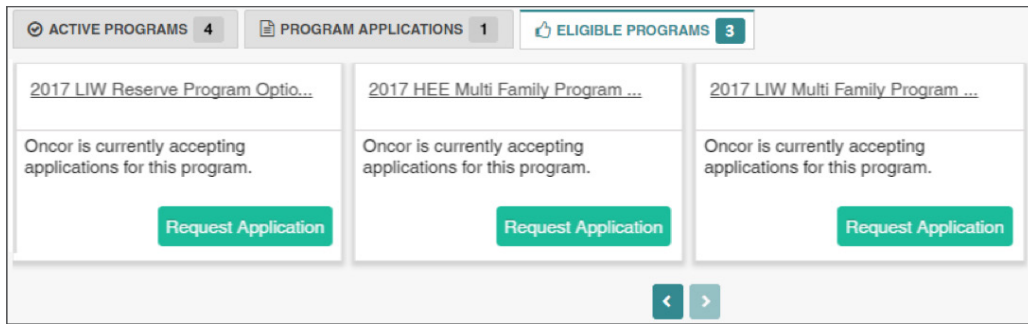
Additional sections include 'Insurance Expiration Dates' with four items (Automobile Liability Insurance, Commercial General Liability Insurance, Worker's Compensation Employer's Liability Insurance, Customer Service Verification) all expiring on 05/01/2018. The 'Quick Tools' section features buttons for ESIID Validation, Incentive Calculator, Training Guides, and Residential Forms.

PROGRAM OPTION ACTIVITY

Eligible Programs

Eligible Programs indicates the number of programs a service provider is qualified or approved to apply for.



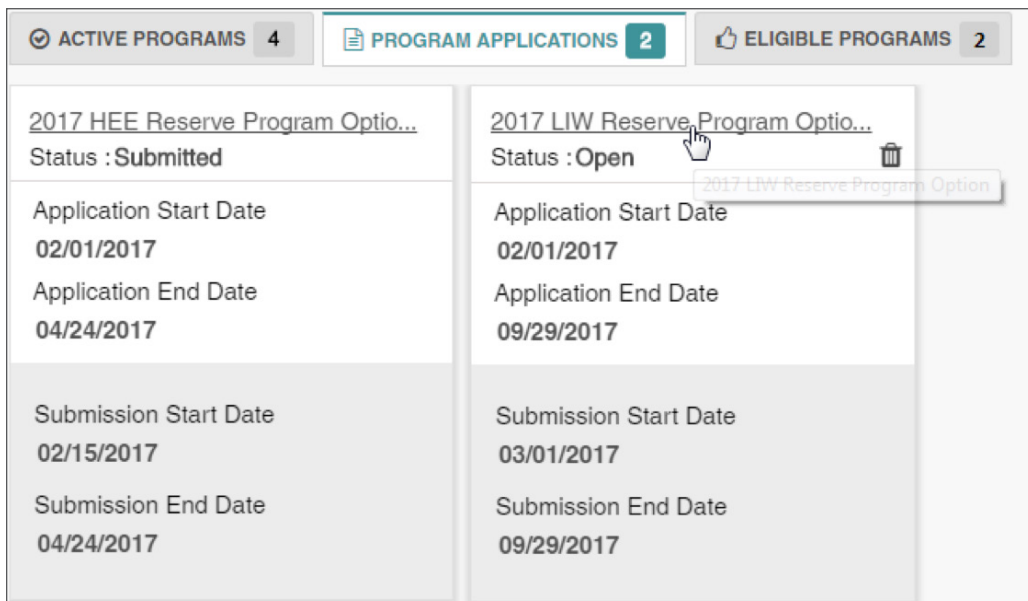


- To view the specific programs, you're eligible for, click on the **Eligible Programs** tab.
 - The corresponding programs will appear in a horizontal series.
 - If the program you want to apply for is not displayed, email the support desk/project manager.
- Navigate right or left using the arrow keys at the bottom.
- Click on **Request Application** to start the program application process.
- Once the time frame for the program application expires, the **Request Application** button will be disabled and service providers will no longer be able to apply.

Program Applications

**Before you begin the Program Application process you must have your insurance agent submit valid insurance forms (auto, general liability and workers comp) to eepminsurance@oncor.com.*

Program Applications will appear with the "Open" status as shown in the image below.



- Click on the **Program Option** link as shown in the above image to view the **Program Applications** screen.
- The **Program Applications** screen will appear.



PROGRAM APPLICATION Application List 2017 LIW Reserve Program Option

APPLICATION **COMMENTS**

POA_17LIWR - 2017 - 13779 **06/07/2017** 1

Application No Application Date I would like my company's information displayed on Oncor's website

Measures I can install [View Oncor Service Area](#) 2

Ceiling Insulation Energy Star Clothes Washer Wall Insulation
 Air Infiltration Aerators Energy Star Dishwasher
 Water Heater Pipe Insulation Showerheads Energy Star Refrigerator
 Floor Insulation Water Heater Jacket Energy Star Window
 Window Air Conditioner

Areas that I serve 3

Warning you may be disqualified from participating in this program if oncor receives customer complaints indicating that you do not serve the areas you have selected

Import county list from previously submitted application

3a

County 3b City Zip Code

Select All 12 out of 78 Selected Select All 34 out of 58 Selected Select All 42 out of 42 Selected

Anderson Montalba 75853
 Andrews Tennessee Colony 75861
 Angelina Palestine 75802
 Archer Poynor 75782
 Bastrop Elkhart 75803
 Baylor Frankston 75801
 Bell Neches 75941
 Brown Andrews 75949
 Cherokee Diboll 75904
 Clay Huntington 75901

Documents 4

DOCUMENT NAME	DESCRIPTION	SP ATTACHMENTS	PM ATTACHMENTS
Attach other documents as required	Other Documents		
Program Addendum*	Upload Signed Copy of Program Addendum	2017_POA_Agreement_Signe d.pdf Delete	

1 1 - 2 of 2 items

5


1. Check the box at the top right to have your company's name added to the Oncor/TALOT website for customers.
2. Select (check the appropriate boxes) for **Measures I can install**.
3. **Areas that I serve** can be selected in two ways:
 - 3a. Import the county list from previously submitted applications by selecting the appropriate item from the drop-down menu.
 - 3b. Select the county manually. Based on the county chosen, the corresponding cities and zip codes will be automatically selected. You can uncheck any cities and zip codes that you do not serve.
4. Upload mandatory **Documents** such as:
 - o Program Addendum
 - o Financial References
5. Click on **Submit Application**.



After you submit the program application, an Oncor program manager will review your submission. Once the review is completed, you'll receive an email notifying you of the decision on your application. If your application is approved, you'll have access to the program in the **Active Programs** list as shown below.

ACTIVE PROGRAMS 2		PROGRAM APPLICATIONS 0		ELIGIBLE PROGRAMS 4	
<u>2017 LIW Reserve Program Optio...</u>			<u>2017 HEE Reserve Program Optio...</u>		
Program Budget			Program Budget		
Total	\$4,061,210.00	Total	\$4,504,110.00		
Allocated	\$230,000.00	Allocated	\$95,000.00		
Remaining	\$3,831,210.00	Remaining	\$4,409,110.00		
My Budget			My Budget		
Total :	\$0.00	Total :	\$0.00		
Incentive Paid :	\$0.00	Incentive Paid :	\$0.00		
Reserved / Blocked :	\$0.00	Reserved / Blocked :	\$0.00		
Remaining	\$0.00	Remaining	\$0.00		

If your application is denied by the program manager, it will be listed in the **Program Applications** tab with a "Rejected" status. You would then need to correct any inaccurate or missing data and resubmit the application for review.

ACTIVE PROGRAMS 4		PROGRAM APPLICATIONS 2		ELIGIBLE PROGRAMS 2	
<u>2017 HEE Reserve Program Optio...</u>			<u>2017 LIW Reserve Program Optio...</u>		
Status : Submitted			Status : Rejected 		
Application Start Date 02/01/2017			Application Start Date 02/01/2017		
Application End Date 04/24/2017			Application End Date 09/29/2017		
Submission Start Date 02/15/2017			Submission Start Date 03/01/2017		
Submission End Date 04/24/2017			Submission End Date 09/29/2017		



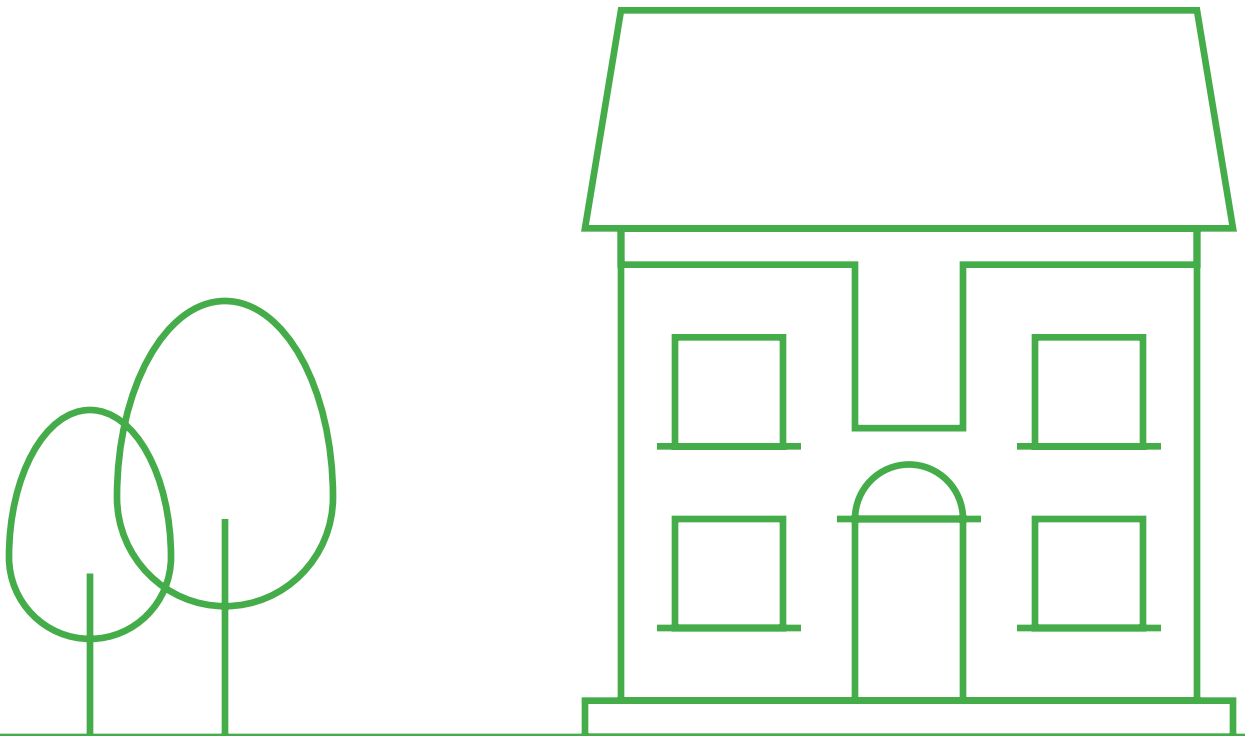
Applications can also be viewed from the **My Applications** tab, which displays a list of each program application and its corresponding status, as shown below.

Application Number	Program option	Program year	Status	Approval Date
POA_17BCSOP - 2017 - 12766	2017 Basic Commercial Standard Offer Program	2017	Approved	05/12/2017
POA_17LIWMF - 2017 - 12755	2017 LIW Multi Family Program Option	2017	Approved	05/12/2017
POA_17HEER - 2017 - 12757	2017 HEE Reserve Program Option	2017	Approved	05/06/2017
POA_17LIWR - 2017 - 12756	2017 LIW Reserve Program Option	2017	Approved	05/06/2017
POA_17SSPVCO - 2017 - 12753	2017 Commercial Solar Program Option	2017	Approved	05/05/2017
POA_17SPVRES - 2017 - 11719	2017 Residential Solar Program Option	2017	Approved	05/05/2017
POA_17CCSOP - 2017 - 12758	2017 Custom Commercial Standard Offer Program	2017	Rejected	-
POA_17HEEMF - 2017 - 12765	2017 HEE Multi Family Program Option	2017	Open	-



Creating a Customer Site List

RESIDENTIAL



CREATING A CUSTOMER SITE LIST

Add Site Information

Service providers must create a customer site list before starting a residential project. Otherwise, projects cannot be created and submitted as project customer screen expects site list to be added which actually comes from different section of the application called customer site list screen.

1

HOME MY APPLICATIONS OPEN CUSTOMERS MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP Logout

CUSTOMER SITE LIST Create New Site Start a New Project

ESI ID	Site Name	Program Name	#Measures	kW Savings	kWh Savings	Incentive	Action
No Records to Display							
				0.0000	0.0	\$ 0.00	

No items to display

Close To PR

1. From the main menu, click on **Open Customers**.
2. Select the program and input either the last seven-digits of your ESI ID or your full nine-digit meter number and include the LG after (xxxxxxxLG).
3. Click **Get Info**, and then the customer site form will appear with auto-populated customer data.

CUSTOMER SITE LIST Customer List

Select Program *
2017 LIW Reserve Program Optio

ESI ID *
0011037

Meter Number
(Or)

3
Get Info Clear

4. The **Service Provider Project Contact Information** section will be auto-filled.
5. The **Service Provider Inspection Contact Information** section can be filled by selecting the existing template from the drop-down menu. To create a new template for the inspection contact after the information is filled in, select the option to **Save as** template and provide the **Template Name**.



ONCOR Energy Efficiency Contractor Portal

(866) 258-1874 Help Desk | support@oncreepm.com Support e-mail

Welcome, Justin Lantern (Admin)
Tuesday, October 10, 2017 01:28:54 AM

HOME MY APPLICATIONS **OPEN CUSTOMERS** MY PROJECTS MY ACCOUNT REQUEST DUPLICATE APPROVAL ONLINE HELP - Logout

CUSTOMER SITE LIST Customer List

Select Program *
2017 HEE Reserve Program Optio

ESI ID * 11111111 Meter Number 111111111LG **Get Info** Clear

4 **Customer Address and Contact Information**

Customer Name * Johnny English Group Type * Single Family

Street 405 HIGHLAND VIEW DR PERM City WYLIE County COLLIN

State TX Zip Code 75098-5103

Alternate Address

Service Provider Project Contact Information

Project Contact Name * Justin Lantern Work Phone No * (111) 111-1111 - XXXX E-mail user@mail.com

Mobile (111) 111-1111

Service Provider Inspection Contact Information

Select an existing Template to fill contact information Contact Name * Green Lantern Work Phone No * (111) 111-1111 - 3111

E-mail user2@mail.com Mobile (111) 111-1111

Customer Inspection Contact Information

Contact Name * Johnny English Work Phone No * (111) 111-1111 - 1111 E-mail user1@mail.com

Mobile (111) 111-1111 Primary Language Spanish Is Texting Allowed : Yes No

I verify that this is the correct site address which should be provided to Oncor's inspectors for this project.
Note: If the address is discovered to be incorrect by an inspector attempting to conduct an inspection, you may be charged for a repeat inspection.

Save as template

Template Name Template1 **5**

(Verify the customer site address to get the Save button enabled) **6** Save

2017 Oncor Electric Delivery Company LLC. Privacy | Legal | Contact

6. Click **Save**. The system will automatically navigate to the next screen where service providers can add measures to the site



Add site documents







Residential programs require mandatory documents like the host customer agreement and income eligibility certificate to be submitted for each customer site added. The document can be attached in two ways:

- Online signing through mobile/tablet/laptop
- Offline signing using PDF templates

Steps for Online Signing

- Click on the orange "Add/View Image"  icon at the top right of the page.

CUSTOMER SITE LIST [+ Create New Site](#) [+ Start a New Project](#)

<input type="checkbox"/>	ESI ID	Site Name	Program Name	#Measures	kW Savings	kWh Savi...	Incentive	Action
<input type="checkbox"/>	9998867	Johnny English	2017 HEE Reserve Program Option	1	0.8573	7,006.4	\$428.76	Add Measure   
		Measures Name	Duplicate Status	kW	kWh	Incentive	Action	Add / View Image
		Water Heater Pipe Insulation	No Duplicate Exists	0.8573	7,006.4	\$428.76	  	
				0.8573	7,006.4	\$ 428.76		

1 - 1 of 1 items

[Close To PR](#)


- Click on the **Host Customer Agreement Form** to open the e-signature template.

CUSTOMER SITE LIST [Customer List](#)

2017 HEE Reserve Program Option **Johnny English** **9998867**
Program Option Name Customer Name ESI ID

Attachment List [Host Customer Agreement Form](#)

Instructions for online signing:
1. Click the document name to open the online e-sign form
2. Fill the form, complete the signature & click "Attach as pdf"
3. To correct the data in the saved attachment, delete the saved pdf file and repeat the above steps

 **DRAG AND DROP FILES HERE**
OR
[Select Files](#)

NO RECORDS FOUND.

- The template will open up with the service provider and customer data already populated. Fill in the additional data in the respective fields.
- Get the customer sign in the signature area and sign your name in the service provider area.
- Click on the **Attach as PDF** button. The system saves the completed form as a PDF and attaches it to the site.



- If any corrections are required in the attached PDF, delete the signed document and repeat the above steps.

CUSTOMER SITE LIST
Customer List

2017 HEE Reserve Program Option <small>Program Option Name</small>	Johnny English <small>Customer Name</small>	9998867 <small>ESI ID</small>	Back To Attachment List
--	---	---	---

Home Energy Efficiency Standard Offer Program
Host Customer Agreement and Certificate

Service Provider Information

Company Name	: SVP Energy Holding LLC
Company Contact Name	: Justin Lantern
Address	: 48th Street
City, State, Zip	: Plano, Texas, 75001-4567
Company Phone	: (657) 567-8876
Email	: user@mail.com

This Agreement must be signed by each party prior to commencement of the project (as defined below)

I. General Information

Program Option : Reserve Multifamily HVAC Host Customer is : Owner Renter

Host Customer information :

Host Customer Name <input type="text" value="Johnny English"/>	Contact person <input type="text" value="Johnny English"/>	Host customer email (Optional) <input type="text" value="user1@mail.com"/>
Phone Number <input type="text" value="(111) 111-1111"/>	Alternate Number <input type="text" value="(111) 111-1111"/>	Best time to call <input type="text" value="5 PM"/>
Signature association with Host customer: (If different) <input type="text"/>	If Host customer is Renter was owner notified <input checked="" type="radio"/> Yes <input type="radio"/> No	Owner Name <input type="text"/>

Project Site Information :

Oncor Electric Delivery ESID <input type="text" value="1111111"/>	Site Address <input type="text" value="405 HIGHLAND VIEW DR PERM"/>	Apt# <input type="text"/> City <input type="text" value="WYLIE"/>
ZIP <input type="text" value="75098-5103"/> County <input type="text" value="COLLIN"/>	Install date <input type="text" value="10/10/2017"/>	In-site installers <input type="text"/>
Heating Type <input checked="" type="checkbox"/> Electric <input type="checkbox"/> Heat Pump <input type="checkbox"/> Gas	No. of stories <input type="text" value="2"/>	Home Type <input checked="" type="checkbox"/> Single Family <input type="checkbox"/> Multifamily <input type="checkbox"/> Mobile Home
No. of Occupants <input type="text" value="5"/>	Shielding <input type="checkbox"/> Exposed <input checked="" type="checkbox"/> Normal <input type="checkbox"/> Well Shielded	No. of Bedrooms <input type="text" value="4"/>
		Total Conditioned ft (Measured) <input type="text" value="1545"/>

II. Host Customer and Service Provider Acknowledgements

SVP Energy Holding LLC ("Service Provider") intends to install energy efficiency measures at facilities owned and/or operated by Johnny English ("Host Customer") at the address(es) ("Project Site(s)") listed above (such installation at the Project Site(s) being the "Project"). The Service Provider is implementing the Project as part of the Home Energy Efficiency Standard Offer Program (the "HEE SOP") offered by Oncor Electric Delivery Company LLC ("Oncor"). In consideration of participation in HEESOP, and for other good and valuable consideration, the receipt, adequacy and legal sufficiency of which are hereby acknowledged, Service Provider and Host Customer agree as follows.

III. Host Customer Agreements

A. Host Customer agrees, upon three (3) days prior notice (which may be written, electronic or verbal), to provide Oncor, the Service Provider and any independent measurement and verification person selected by the Public Utility Commission of Texas with full and complete access to the Project Site for any purpose related to, or arising from the HEESOP. The right of access will be subject to the Host Customer's reasonable access requirements and, unless otherwise agreed, should occur during convenient hours of the Host Customer.

VIOLATION OF ANY LOCAL, STATE, OR FEDERAL LAW OR REGULATION INCLUDING, BUT NOT LIMITED TO, ENVIRONMENTAL AND HEALTH AND SAFETY LAWS OR REGULATIONS; 4) STRICT LIABILITY IMPOSED BY ANY LAW OR REGULATION; 5) EQUIPMENT MALFUNCTIONS; OR 6) ENERGY SAVINGS SHORTFALLS OF THE PROJECT; AND FURTHER IT IS THE EXPRESS INTENT OF THE PARTIES THAT FOR THE PURPOSES OF ANY SUCH CLAIMS RELATING TO THE INJURY OF DEATH OF PERSONS, SUCH CLAIMS AND CUSTOMER'S OBLIGATIONS TO DEFEND, PROTECT, INDEMNIFY, AND HOLD HARMLESS, WILL INCLUDE BUT NOT BE LIMITED TO, CLAIMS ARISING OUT OF OR RESULTING FROM ONCOR GROUP'S SOLE OR CONCURRENT (1) NEGLIGENCE (2) STRICT LIABILITY, OR (3) OTHER FAULT OF ANY NATURE. I hereby warrant and represent that the listed measures have been installed at the Project Site on the date indicated. I attest with my signature that the measure(s) listed will not be reported in any other program where the energy savings from such measure(s) will be reported to the state of Texas. This can include, but not be limited to, other programs sponsored by Oncor, federal or state governments/agencies, the Electric Reliability Council of Texas (ERCOT), or other utilities.

<p>SERVICE PROVIDER SIGNATURE Sign Below</p> <div style="border: 1px dashed #ccc; height: 60px; margin-bottom: 5px; display: flex; align-items: center; justify-content: center; font-size: 2em; font-family: cursive;">Justin</div> <div style="text-align: right; margin-bottom: 5px;"><input type="button" value="Clear"/></div> <p>Name/Title <input type="text" value="Justin Lantern"/></p> <p>Company if applicable <input type="text" value="SVP Energy Holding LLC"/></p> <p>Date <input type="text" value="10/10/2017"/> </p>	<p>HOST CUSTOMER SIGNATURE Sign Below</p> <div style="border: 1px dashed #ccc; height: 60px; margin-bottom: 5px; display: flex; align-items: center; justify-content: center; font-size: 2em; font-family: cursive;">Johnny</div> <div style="text-align: right; margin-bottom: 5px;"><input type="button" value="Clear"/></div> <p>Name/Title <input type="text" value="Johnny English"/></p> <p>Company if applicable <input type="text"/></p> <p>Date <input type="text" value="10/10/2017"/> </p>
--	--

2017 Oncor Electric Delivery Company LLC.
Privacy | Legal | Contact




CUSTOMER SITE LIST Customer List

2017 HEE Reserve Program Option Program Option Name	Johnny English Customer Name	9998867 ESI ID
---	--	--------------------------

Attachment List Host Customer Agreement Form

Instructions for online signing:


1. Click the document name to open the online e-sign form
2. Fill the form, complete the signature & click "Attach as pdf"
3. To correct the data in the saved attachment, delete the saved pdf file and repeat the above steps



DRAG AND DROP FILES HERE

OR

Select Files

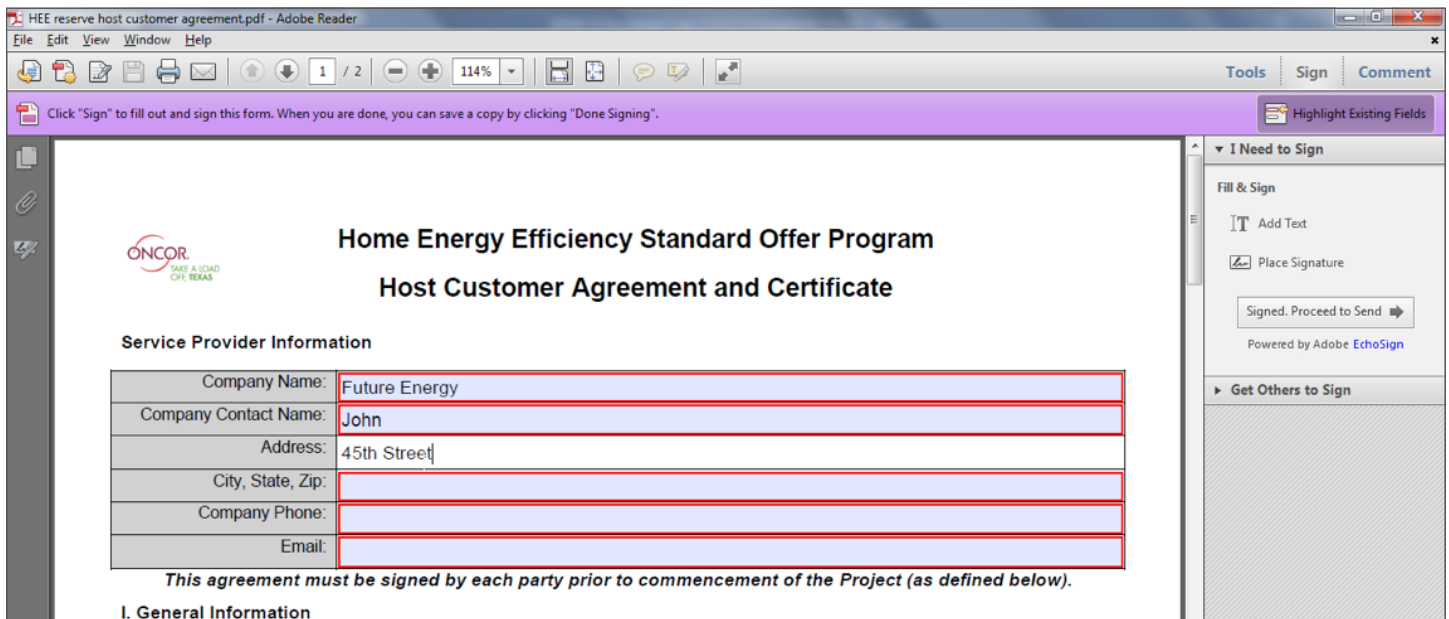
 **1111111_JohnnyEnglish...** 100% 138 KB

1111111_JohnnyEnglish_HCA.pdf

Signed Host Customer Agreement attached as PDF

Steps for Offline Signing

- Download the PDF templates from the home page, located in the Residential Forms section at the bottom of the page.
- Open the PDF and fill in the service provider and customer data.



HEE reserve host customer agreement.pdf - Adobe Reader

File Edit View Window Help

1 / 2 114%

Click "Sign" to fill out and sign this form. When you are done, you can save a copy by clicking "Done Signing".

Home Energy Efficiency Standard Offer Program
Host Customer Agreement and Certificate

Service Provider Information

Company Name:	Future Energy
Company Contact Name:	John
Address:	45th Street
City, State, Zip:	
Company Phone:	
Email:	

This agreement must be signed by each party prior to commencement of the Project (as defined below).

I. General Information

I Need to Sign

Fill & Sign

- Add Text
- Place Signature

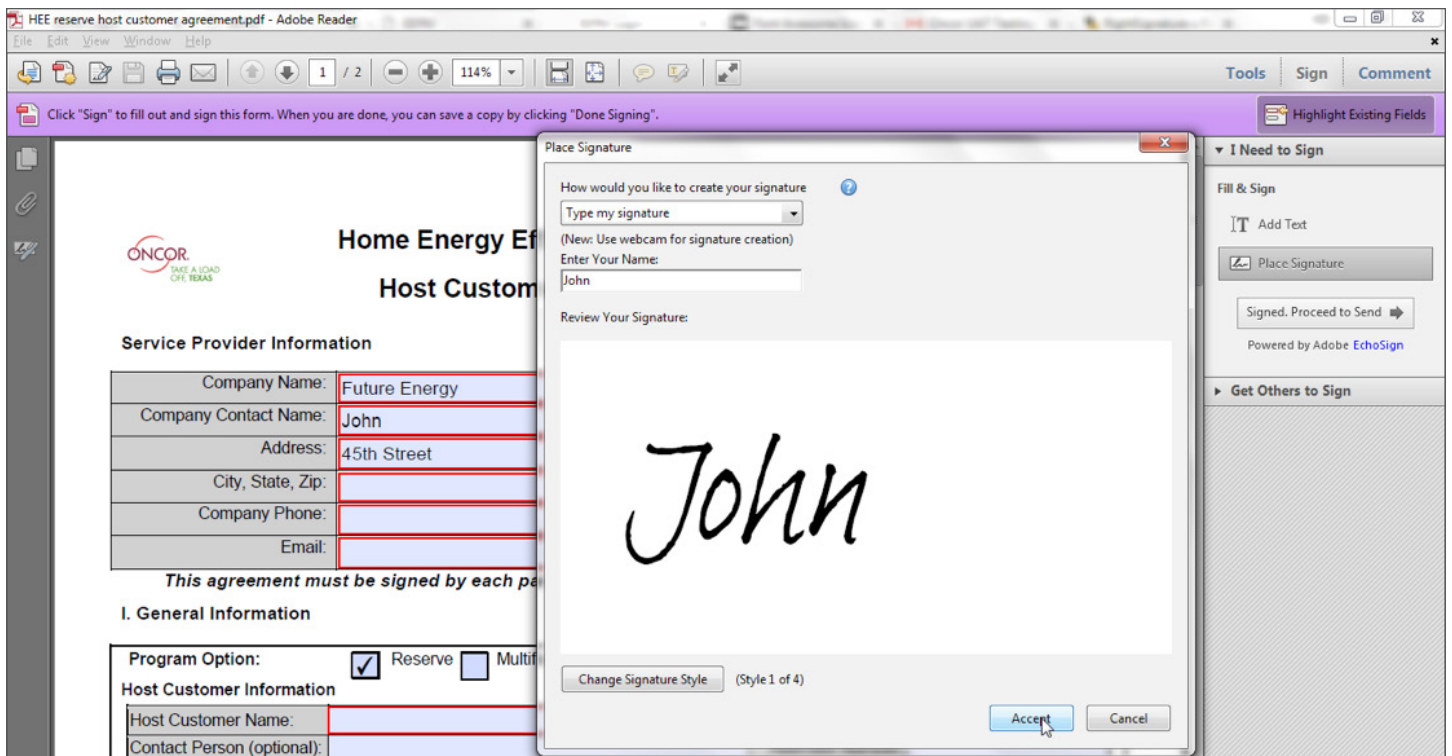
Signed. Proceed to Send

Powered by Adobe EchoSign

Get Others to Sign

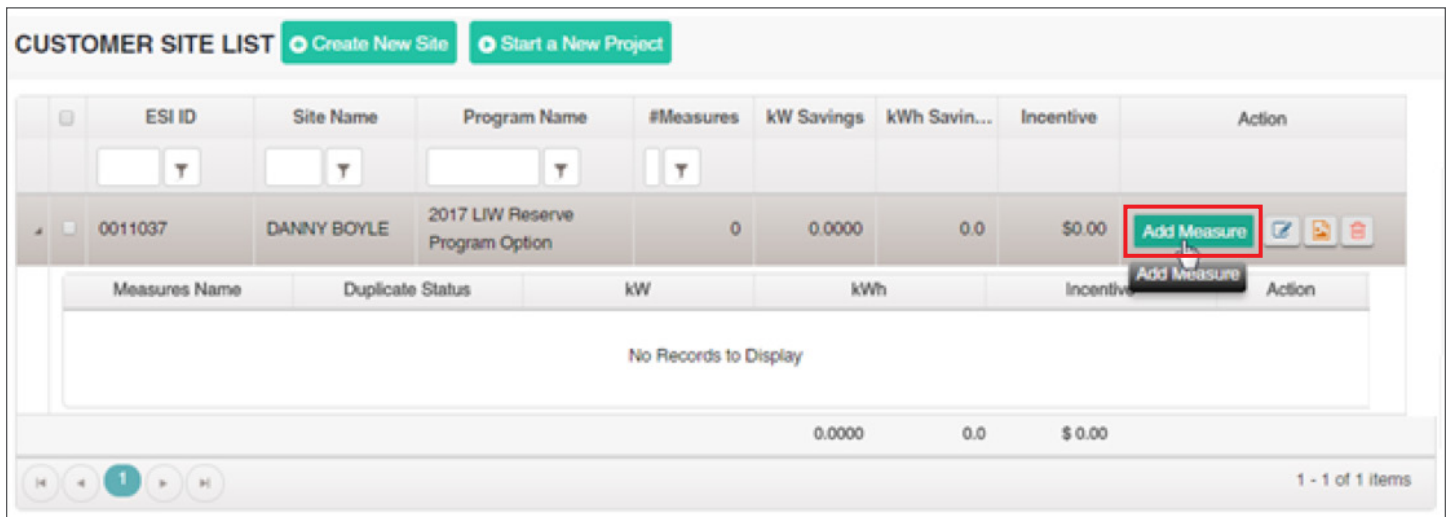
Use the Adobe PDF Reader's sign feature to either draw, type or upload your signature in the PDF document. Another option is to print the document, sign it and scan it.





- Save the signed PDF and log in to the portal to upload the document in the **Add/View Images** section.

Add Measures



- Click on the **Add Measure** button at the top right of the screen and select the appropriate measure from the drop-down menu.
- Once the measure is selected, the system will request measure inputs. Fill in all of the required fields.



CUSTOMER SITE LIST Customer List

Johnny English Customer Name	2017 HEE Reserv... PO Name	1111111 ESI ID	7,006.4 kWh	0.8573 kW	\$428.76 Incentive
--	--------------------------------------	--------------------------	-----------------------	---------------------	------------------------------

Measure *
Water Heater Pipe Insulation

Climate Zone: 2
Pipe Wrap(s): 1
Location: Conditioned

Pipe Length: 570
Pipe Diameter: 0.75
R Value: 15







Notes (Max. 1000 Characters allowed):

Save

- Click on the **Save** button. The system will calculate the kW & kWh savings and the incentive amount for the added measure.

Once the measure has been added successfully, the system will navigate to the customer site list screen where you'll see the site and measures that were added.

CUSTOMER SITE LIST Create New Site Start a New Project

ESI ID	Site Name	Program Name	#Measures	kW Savings	kWh Savi...	Incentive	Action	
0011037	DANNY BOYLE	2017 LIW Reserve Program Option	1	1.4760	2,700.0	\$886.98	Add Measure   	
Measures Name	Duplicate Status	kW	kWh	Incentive	Action			
Ceiling Insulation	Duplicate(s) Found	1.4760	2,700.0	\$886.98	  			
				1.4760	2,700.0	\$ 886.98		

1 - 1 of 1 items

- Repeat the steps above to add more measures to the same site.
- Added measure(s) will be displayed in a grid format as shown above.

Edit Site & Measure

- To edit the site/measure information, click on the **Edit** button in the grid.
- To delete a site/measure, click on the "trash can" icon
- Click on the "image" icon to add/view site/measure images.



0011037	DANNY BOYLE	2017 LIW Reserve Program Option	1	1,476.0	2,700.0	\$886.98	Add Measure		
Measures Name	Duplicate Status	kW	kWh	Incentive	Action				
Ceiling Insulation	Duplicate(s) Found	1,476.0	2,700.0	\$886.98					
		1,476.0	2,700.0	\$ 886.98	Edit Measure				

Site & Measure Information in Customer Site List Screen

CUSTOMER SITE LIST										
Create New Site		Start a New Project								
ESI ID	Site Name	Program Name	#Measures	kW Savings	kWh Savi...	Incentive	Action			
0011038	TONY STARK	2017 LIW Reserve Program Option	1	2,830.2	4,750.7	\$2,142.71	Add Measure			
Measures Name	Duplicate Status	kW	kWh	Incentive	Action					
Wall Insulation	Duplicate(s) Found	2,830.2	4,750.7	\$2,142.71						
0011037	DANNY BOYLE	2017 LIW Reserve Program Option	2	1,516.1	2,786.6	\$917.04	Add Measure			
Measures Name	Duplicate Status	kW	kWh	Incentive	Action					
Ceiling Insulation	Duplicate(s) Found	1,476.0	2,700.0	\$886.98						
Aerators	No Duplicate Exists	0.0401	86.6	\$30.06						
				4,346.3	7,537.3	\$ 3,059.75				

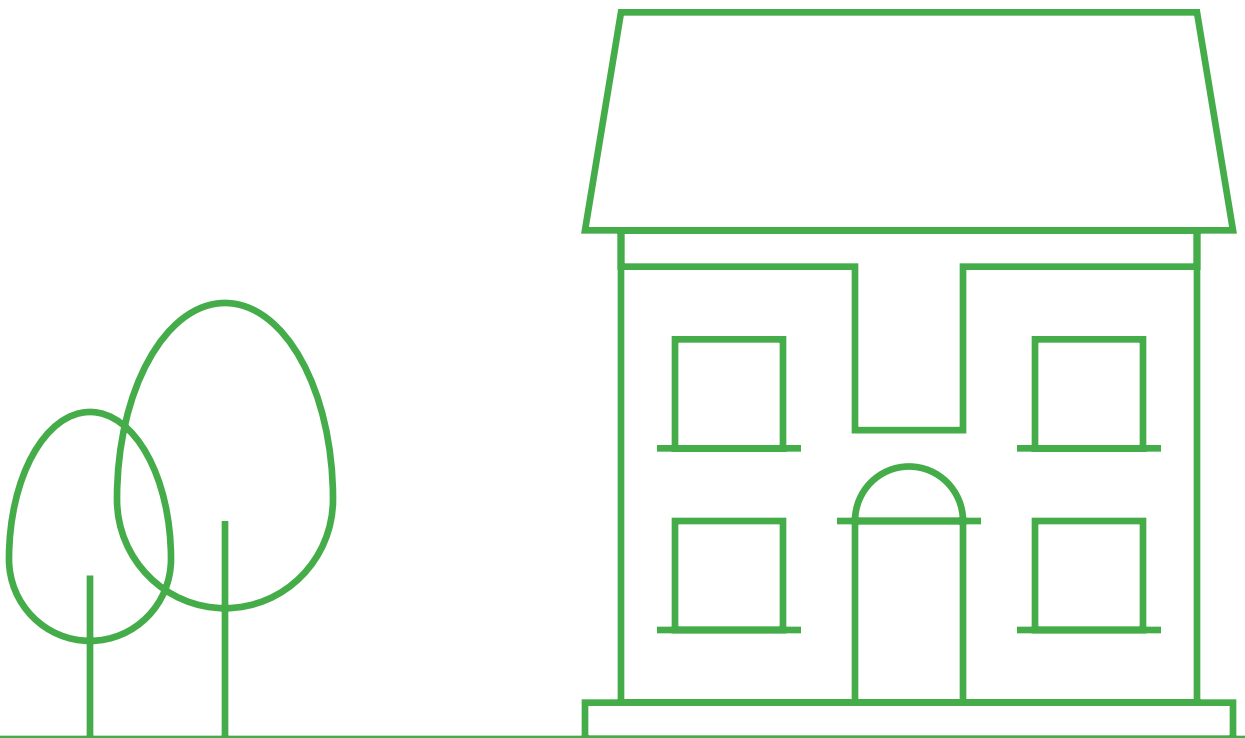
1 - 2 of 2 items

Repeat the steps mentioned above to add multiple sites and measures. The **Customer Site List** screen will display site and measure data such as measure counts, kW and kWh savings, and incentive amounts.



Starting a New Residential Project

RESIDENTIAL



STARTING A NEW RESIDENTIAL PROJECT

Starting a new residential project is simple in EEPM 2.0. The project can be created directly from the **Customer Site List** screen or from **My Projects** by clicking the **Start a New Project** button.

My Projects

The **My Projects** screen includes options to **Start a New Project** and view **Historical Projects** (projects from the previous program year). The table will list all projects with details such as the project code, status and incentive amount.

Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Compl...	Action
2017 BCSOP Test Project1	17BCSOP - 2017 - 70910	IA Open	\$1,570.76	1	06/30/2017	
2017 BCSOP Test Project1	17BCSOP - 2017 - 70910	IA Open	\$785.38	1	06/30/2017	
BA Test LIW	17TLIW - 2017 - 64837	IN Submitted	\$2,089.00	1		
Hazzlewood solar project	17SPVRES - 2017 - 64472	IA Open	\$3,856.42	1	05/31/2017	
Harman solar	17SPVRES - 2017 - 63274	FA Pre-Inspection Inprogress	\$3,559.95	1	05/27/2017	
Harlington society test proj	17LIWR - 2017 - 63276	IN Submitted	\$937.25	2		
BA Solar test project RA1	17SPVRES - 2017 - 63262	IA Rejected To SP	\$0.00	1	06/30/2017	

1 - 7 of 7 items

Action Buttons

	View: To view a project you've submitted, start with the My Projects table. Use the filter options available in the column headers to refine your search. Then, click the "eye" icon in the Action column. The row color will change to dark gray.
	Edit: To edit your open projects, click on the "pen and paper" icon in the Action column.
	Delete: To permanently delete a project, click on the "trash can" icon in the Action column.



Start a New Project

- Click on **Start a New Project** from the **My Projects** tab or **Open Customers** tab.
- The system will navigate to the **Start a New Project** screen as shown below.

The screenshot shows the 'MY PROJECTS' interface with a 'Customer list' dropdown. The 'START A NEW PROJECT' tab is active. The 'Select Program' dropdown is set to '2017 LIW Reserve Program Option'. The 'Project Name' field contains '2017 Test LIW project1'. At the bottom right, there are 'Cancel' and 'Save & Continue' buttons.

- Select the program option from the **Select Program** drop-down menu.
- Enter the **Project Name**.
- Click on **Save & Continue** to save the project. The system will navigate to the next tab.
- To discard the project, click on **Cancel**.

Close Customers

Sites in the project can be closed in two ways:

- o Close the sites created from the **Close Customers** tab within the project as shown below. Select the required sites and click **Close to PR**. The system will navigate to the next tab and the selected sites will appear in the **Customers & Measures** tab.





The screenshot shows the 'MY PROJECTS' interface with the 'CLOSE CUSTOMERS' tab active. The project name is '2017 Test LIW projec...' and the project code is '17LIWR - 2017 - 6990...'. The status is 'IN Open'. A table lists sites with columns for Site, Measures #, kW, kWh, and Incentive Amount. The 'DANNY BOYLE' and 'TONY STARK' sites are selected. At the bottom right, there are 'Cancel' and 'Close to PR' buttons.

Site	Measures #	kW	kWh	Incentive Amount
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> DANNY BOYLE	2	1.5161	2,786.6	\$917.04
<input checked="" type="checkbox"/> TONY STARK	1	2.8302	4,750.7	\$2,142.71

- o Close the customers from the **Customer Site List** screen as shown below. Select the sites from the grid and click the **Close to PR** button. The selected sites will be moved to the **Customer & Measures** tab of an open project, which should be created prior to doing this action.



CUSTOMER SITE LIST [Create New Site](#) [Start a New Project](#)

<input type="checkbox"/>	ESI ID	Site Name	Program Name	#Measures	kW Savings	kWh Savin...	Incentive	Action
<input checked="" type="checkbox"/>	0011038	TONY STARK	2017 LIW Reserve Program Option	1	2.8302	4,750.7	\$2,142.71	Add Measure  
<input checked="" type="checkbox"/>	0011037	DANNY BOYLE	2017 LIW Reserve Program Option	2	1.5161	2,786.6	\$917.04	Add Measure  
					4.3463	7,537.3	\$ 3,059.75	

1 - 2 of 2 items

[Close To PR](#)

If there is no site information listed in the site grid, add the site and measures information by following the steps described earlier.











Open Customers → Create New Site → Add Measures

Customers & Measures

Sites which are closed to the projects will be displayed under this tab. At this stage, to remove the sites from the project, select the sites and click the **Exclude** button. This action will remove the closed sites from the current project and the site will be available in the **Close Customers** tab.

1 START A NEW PROJECT 2 CLOSE CUSTOMERS **3 CUSTOMERS & MEASURES** 4 UPLOAD DOCUMENTS 5 REVIEW & SUBMIT

2017 LIW Test Projec... 17LIWR - 2017 - 6000... IN Open
Project Name Project Code Status

<input type="checkbox"/>	ESIID	Customer Site...	kW Savings	kWh Savings	Incentive Amo...	Action	
<input checked="" type="checkbox"/>	1489716	Joaquin Sanchez	2.6141	4,830.4	\$1,572.91	 	
		Measures Name	Duplicate Status	kW	kWh	Incentive	Action
		Ceiling Insulation	No Duplicate Exists	2.6141	4,830.4	\$1,572.91	 
<input type="checkbox"/>	4034169	Socorro Rivas	1.6985	3,139.0	\$1,022.01	 	
		Measures Name	Duplicate Status	kW	kWh	Incentive	Action
		Ceiling Insulation	No Duplicate Exists	0.7060	1,305.0	\$424.82	 
		Ceiling Insulation	No Duplicate Exists	0.9925	1,834.0	\$597.19	 
			4.3126	7,969.4	\$ 2,594.92		

1 - 2 of 2 items [Exclude](#)

[Prev](#) [Cancel](#) [Save & Continue](#)



After adding all of the required sites, click **Save & Continue** to navigate to the **Upload Documents** tab.

Upload Documents

In the **Upload Documents** tab, the service provider must e-sign and submit the production summary report.

- Click on the "[PR Summary](#)" link. The system will open the report with customer data and project savings.
- Draw the signature on the canvas and click **Attach as PDF**. The signed report will be attached as a PDF in the service provider (SP) attachments column.

The screenshot displays the 'Energy Efficiency Contractor Portal' interface. At the top, the ONCOR logo is on the left, and contact information including a phone number (866) 258-1874, an email address support@oncoreepm.com, and a user welcome message for Thassa Bunpheng (Admin) is on the right. A navigation bar contains links for HOME, MY APPLICATIONS, OPEN CUSTOMERS, MY PROJECTS, MY ACCOUNT, REQUEST DUPLICATE APPROVAL, and ONLINE HELP, along with a Logout button. The main content area is titled 'MY PROJECTS' and shows a 'Customer list' dropdown. The current project is '2017 LIW Reserve Program Option'. A progress bar indicates five steps: 1. START A NEW PROJECT, 2. CLOSE CUSTOMERS, 3. CUSTOMERS & MEASURES, 4. UPLOAD DOCUMENTS (active), and 5. REVIEW & SUBMIT. Below the progress bar, project details are shown: '2017 LIW Test Project' (Project Name), '17LIWR - 2017 - 59301' (Project Code), and 'IN Open' (Status). A table lists documents with columns for Document Name, Description, SP Attachments, PM Attachments, and Action. One document, 'PR Summary', is listed with a link and a paperclip icon. A pagination control shows '1 - 2 of 2 items'. At the bottom of the document list, there are 'Prev', 'Cancel', and 'Save & Continue' buttons. The footer contains '2017 Oncor Electric Delivery Company LLC.' and 'Privacy | Legal | Contact'.



MY PROJECTS Customer list 2017 LIW Reserve Program Option

1 START A NEW PROJECT 2 CLOSE CUSTOMERS 3 CUSTOMERS & MEASURES 4 **UPLOAD DOCUMENTS** 5 REVIEW & SUBMIT

2017 LIW Test Project 17LIWR - 2017 - 59301 IN Open - [Back To Attachment List](#)
 Project Name Project Code Status

PRODUCTION REPORT

Project Service Provider Information

Service Provider	Contact	Street Address	City, State, Zip	Phone	E-Mail
NRG Savers	Thassa	500 East Arapaho Rd. #205,	Richardson, Texas, 75081	(214) 597-5119	thassab@hotmail.com

Project Summary Information

Production Report Number	Production Report Name	Production Report Status	Submitted Date
17LIWR - 2017 - 59301	Dev Test project	IN Open	null

Installation Summary

Premise Type	# of Installation	Requested kW	Requested kWh	Requested Incentive	Adjusted kW	Adjusted kWh	Adjusted Incentive
Single Family	15	14.3265	25573.2	8433.68	14.3265	25573.2	8433.68
Total	15	14.3265	25573.2	8433.68	14.3265	25573.2	8433.68

Customer Site Information

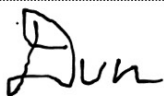
Customer Name	ESIID	# of Measure	Requested Savings (kW)	Requested Savings (kWh)	Requested Incentive	Adjusted kW	Adjusted kWh	Adjusted Incentive
David Williams	4377741	2	1.9607	3602.4	1178.91	1.9607	3602.4	1178.91
James Steele	4377834	2	1.8911	3474.4	1137.05	1.8911	3474.4	1137.05
LaBreshia Orr	7597404	2	2.7395	4309.2	1472.19	2.7395	4309.2	1472.19

Customer Site Measure Information


Customer Name	ESIID	Premise Type	Phone Number	Completed Date	Measure	Requested Savings (kW)	Requested Savings (kWh)	Requested Incentive	Adjusted Savings (kW)	Adjusted Savings (kWh)	Adjusted Incentive
David Williams	4377741	Single Family	(817) 212-9685	Oct 10, 2017	Ceiling Insulation	1.6458	3026.4	989.68	1.6458	3026.4	989.68
David Williams	4377741	Single Family	(817) 212-9685	Oct 10, 2017	Ceiling Insulation	0.3149	576	189.23	0.3149	576	189.23
James Steele	4377834	Single Family	(817) 808-4851	Oct 10, 2017	Ceiling Insulation	0.3149	576	189.23	0.3149	576	189.23
James Steele	4377834	Single Family	(817) 808-4851	Oct 10, 2017	Ceiling Insulation	1.5762	2898.4	947.82	1.5762	2898.4	947.82
LaBreshia Orr	7597404	Single Family	(817) 495-2608	Oct 10, 2017	Air Infiltration	0.9575	1049.4	294.23	0.9575	1049.4	294.23

This form has been checked by the Project Service Provider, and all information is true and accurate.

SERVICE PROVIDER SIGNATURE
Sign Below



Name/Title

Date
 

2017 Oncor Electric Delivery Company LLC. Privacy | Legal | Contact

- Click **Save & Continue** to move to the next tab.

Review & Submit

The **Review & Submit** page allows service providers to review all of the entered information from the **Start a New Project** and **Upload Documents** tabs. Review all information for accuracy before submitting the project.



The **Submit Project** button sends the project to the Oncor program manager’s queue. Once the project is submitted successfully, the status will immediately change from “IN Open” to “IN Submitted.” The system will redirect to the **My Projects** page, and the project will be listed as “IN Submitted” in the dashboard.

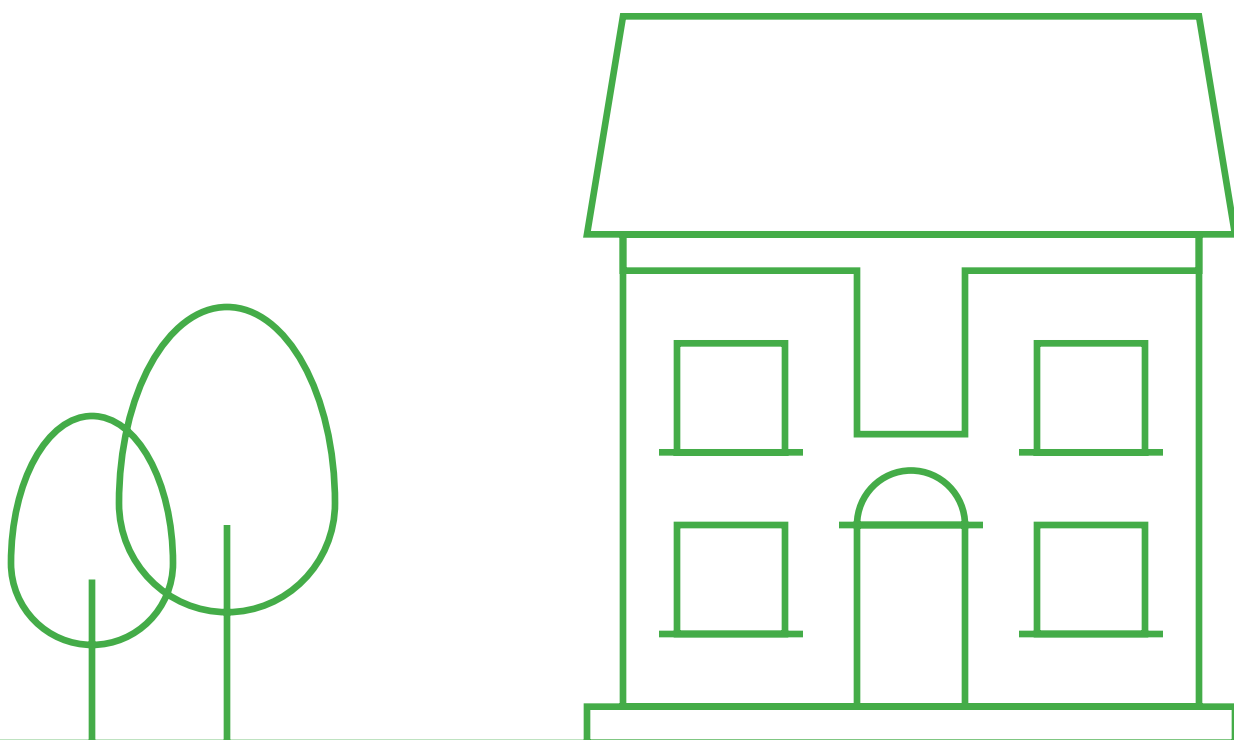
As the project progresses through each stage, users will receive email notifications indicating the status of the project.

1. Review all attached documents
2. Enter **Anti-Spam** code
3. Click **Submit**



Editing a Project

RESIDENTIAL



EDITING A PROJECT

There are two ways to edit a project:

- Filter and browse **Recently Viewed Projects**.
- Search from the list in the **My Projects** table.

Recently Viewed Projects

The **Recently Viewed Projects** tab, located in the service provider dashboard menu, lists all recently viewed projects.

Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Completion ...
Hazzlewood solar project	17SPVRES - 2017 - 64472	IA Open	\$3,856.42	1	05/31/2017
WWR	17LIM Edit Project 39922	IN Open	\$0.00	0	

- Filter the project by status under the **Status** column header.
- Review the **Project Name** (first column) and **Project Code** (second column) for a specific project.
- Click on the **Project Code** hyperlink to view and edit the project.

My Projects

From the main menu, click on **My Projects**, located in the service provider dashboard menu.

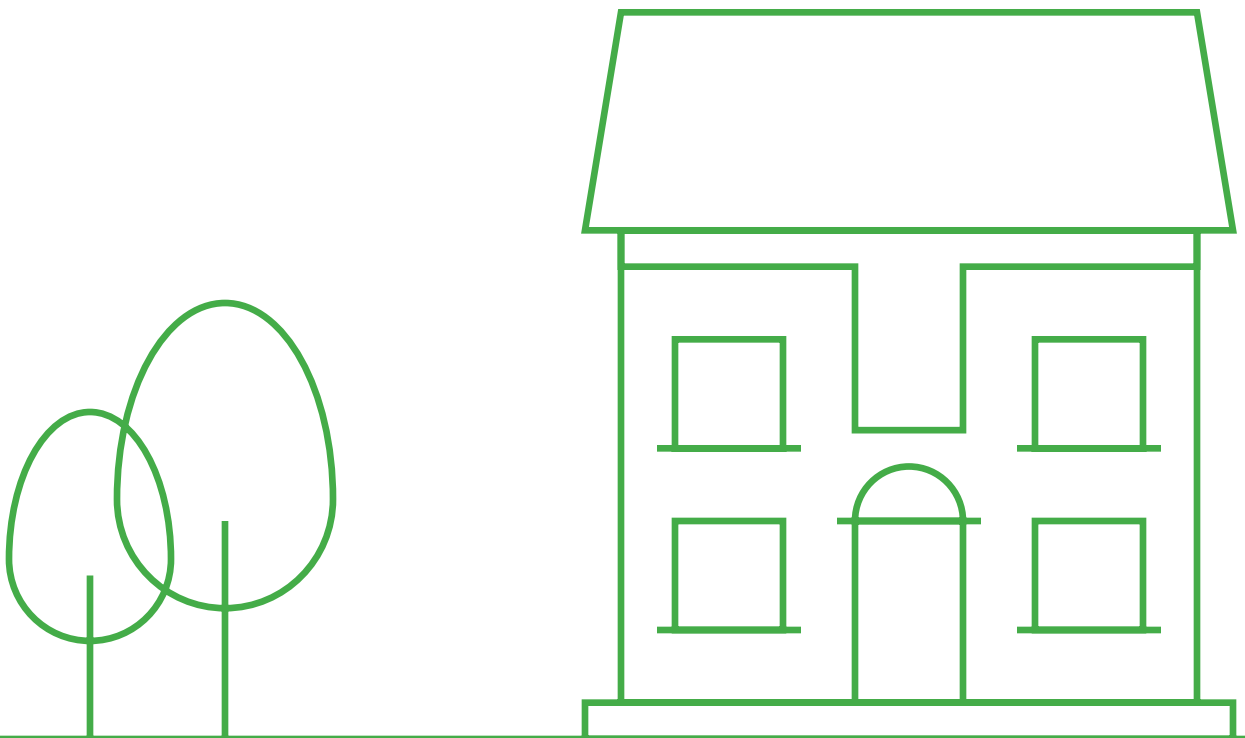
Project Name	Project Code	Status	Incentive Amount	Sites	Estimated Compl...	Action
2017 BCSOP Test Project1	17BCSOP - 2017 - 70810	IA Open	\$785.38	1	06/30/2017	
BA Test LIW	17TLIW - 2017 - 64837	IN Submitted	\$2,089.00	1		
Hazzlewood solar project	17SPVRES - 2017 - 64472	IA Open	\$3,856.42	1	05/31/2017	
Harman solar	17SPVRES - 2017 - 63274	FA Pre-Inspection Inprogress	\$3,559.95	1	05/27/2017	
Harrington society test proj	17LIWR - 2017 - 63276	IN Submitted	\$937.25	2		
BA Solar test project BA1	17SPVRES - 2017 - 63262	IA Rejected To SP	\$0.00	1	06/30/2017	

- Search for the project using the **Project Name** or **Project Code** filters.
- Click on the corresponding icons under the **Action** column to view and edit the project.











Request for Duplicate Approval

RESIDENTIAL



REQUEST FOR DUPLICATE APPROVAL

Service providers are not allowed to submit the project if the measure added under the site is duplicated. Duplicate measures must be approved by the Oncor program manager prior to project submission.

ESIID	Customer Site N...	kW Savings	kWh Savings	Incentive Amount	Action	
0422567	Tuusey	0.1718	1,404.3	\$98.82	 	
Measures Name		Duplicate Status	kW	kWh	Incentive	Action
Water Heater Pipe Insulation		Duplicate(s) found	0.1718	1,404.3	\$98.82	 
0315864	Scot arrey	1.2132	2,219.4	\$838.43	 	
Measures Name		Duplicate Status	kW	kWh	Incentive	Action
Ceiling Insulation		No Duplicate Exists	1.2132	2,219.4	\$838.43	 
			1.3850	3,623.7	\$ 937.25	

To send the measure duplicate approval request:

1. Navigate to **Request Duplicate Approval** from the main menu.
2. Select the site which has duplicate measure.
3. Enter the comment.
4. Click **Request Duplicate Approval** button. The request will be sent to the program manager for approval.
5. Click on **Measure History** to view complete details of the previously submitted measure.

1

Program Opt...	Measure Name	ESII ID	Serial N...	Status	SP Com...	PM Co...
2017 Basic Commercial Standard Offer Program	Deemed Cooling	000041		Duplicate		Measure History
2017 Commercial Solar Program Option	Solar PV	0001027		Duplicate		Measure History
2017 Commercial Solar Program Option	Solar PV	0001027		Duplicate		Measure History

3

Reinstalling the measures in the above sites

4

5

Oncor Program manager reviews the request for duplicate measure and approves/rejects it. Service provider will be notified via email and then can proceed to submit the project.



Thank you

for participating in Oncor's
Energy Efficiency programs.

If you have questions, please email
us at support@oncoreepm.com.